

# APPENDIX 1: LIST OF SAMPLE POLICIES/FORMS

## General

- The Society of Georgia Archivists maintains a Forms Forum, where they have compiled a variety of forms used by archives and special collections libraries. This page is updated and new forms are added periodically. <http://soga.org/forms>

## Administration

- Legal authority to preserve government records. Georgia Archives. [http://www.sos.ga.gov/archives/who\\_are\\_we/rims/digital\\_History/policies/policy%20-%20Legal%20Authority.pdf](http://www.sos.ga.gov/archives/who_are_we/rims/digital_History/policies/policy%20-%20Legal%20Authority.pdf)
- Mission statement, Georgia Archives. [http://www.sos.georgia.gov/archives/who\\_are\\_we/default.htm](http://www.sos.georgia.gov/archives/who_are_we/default.htm)
- Mission statement, Georgia Historical Society. <http://www.georgiahistory.com/containers/32>
- Mission statement, Troup County Archives. <http://www.trouparchives.org/>
- Mission statement, Richard B. Russell Library, University of Georgia Libraries. <http://www.libs.uga.edu/russell/aboutus/mission.shtml>
- University Library Strategic Plan. Georgia State University. <http://www.library.gsu.edu/about/strategicplan/>
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## Staffing

- Volunteer page (includes online forms). Georgia Archives. <http://sos.georgia.gov/archives/Volunteer/VolunteerMainPage.htm>
- Selecting and Working With an Archival Consultant. California State Archives. <http://www.sos.ca.gov/archives/ed-resources/consultants-tips.htm>

## Acquisition/Collection Development Policy

- Collection Development Policy. Georgia Historical Society Library and Archives Division. [http://www.georgiahistory.com/files/0000/0326/Collection\\_Development\\_Policy\\_11-03-08.pdf](http://www.georgiahistory.com/files/0000/0326/Collection_Development_Policy_11-03-08.pdf)
- Collection Development Policy. Clay County Archives, Clay County Library. <http://www.fortgaines.com/include/library-collection-policy.pdf>
- Archives and Records Management Collection Development Policy. Georgia Tech Library and Information Center. [http://www.library.gatech.edu/archives/forms/Collection\\_Policy.pdf](http://www.library.gatech.edu/archives/forms/Collection_Policy.pdf)

## Collection Assessment/Archival Appraisal

- Transfer Guidelines for Candler School of Theology Records. Pitts Theology Library, Emory University.

- [http://www.pitts.emory.edu/collections/archives\\_stafftransfer.cfm](http://www.pitts.emory.edu/collections/archives_stafftransfer.cfm)
- Guidelines for Transfer of Faculty Personal Papers. Pitts Theology Library, Emory University. [http://www.pitts.emory.edu/collections/archives\\_facultydonate.cfm](http://www.pitts.emory.edu/collections/archives_facultydonate.cfm)

#### Documenting Acquisitions

- Deed of Gift Form. Georgia Historical Society.  
[http://www.georgiahistory.com/files/0000/0039/Deed\\_of\\_Gift\\_2006.pdf](http://www.georgiahistory.com/files/0000/0039/Deed_of_Gift_2006.pdf)
- Deed of Gift Form. Library and Information Center, Georgia Tech.  
[http://www.library.gatech.edu/archives/forms/Deed\\_of\\_Gift.pdf](http://www.library.gatech.edu/archives/forms/Deed_of_Gift.pdf)
- Memorandum of Deposit. Georgia Historical Society.  
[http://www.georgiahistory.com/files/0000/0040/deposit\\_agreement\\_04.pdf](http://www.georgiahistory.com/files/0000/0040/deposit_agreement_04.pdf)
- Deed of Gift Form. Valdosta State University Archives.  
<http://soga.org/resources/Documents/FF%20-%20Deed%20of%20Gift%20-%20Valdosta%20State%20University%20Archives.pdf>

#### Accessioning/Deaccessioning

- Accession Forms: Representative Samples. Library of Congress.  
<http://www.loc.gov/rr/print/tp/Accession%20Form%20Samples.pdf>
- Accessions Form, Valdosta State University Archives.  
<http://soga.org/resources/Documents/FF%20-%20Accessions%20-%20Valdosta%20State%20University%20Archives.pdf>

#### Arrangement and Description

- Raymond Andrews Papers online finding aid. Manuscript, Archives, and Rare Book Library, Emory University.  
[http://marbl.library.emory.edu/findingaids/browse\\_results?q=findingaids/content&id=andrewsraymond673\\_102619](http://marbl.library.emory.edu/findingaids/browse_results?q=findingaids/content&id=andrewsraymond673_102619)
- MaryAnne Gaunt Papers online finding aid. Women's Collection. Georgia State University Library Special Collections.  
<http://www.library.gsu.edu/spcoll/xml/W080.xml>
- Collection Summary Form (basic processing template). Georgia Historical Society.  
[http://soga.org/resources/Documents/FF%20-%20Finding%20Aid%20Template%20\(Basic%20Processing\)%20-%20Georgia%20Historical%20Society.pdf](http://soga.org/resources/Documents/FF%20-%20Finding%20Aid%20Template%20(Basic%20Processing)%20-%20Georgia%20Historical%20Society.pdf)
- Processing Form. Valdosta State University Archives.  
<http://soga.org/resources/Documents/FF%20-%20Processing%20Form%20-%20Valdosta%20State%20University%20Archives.pdf>

#### Environmental Control

- Environmental Data Chart. Reese Library, Augusta State University.  
<http://soga.org/resources/Documents/FF%20-%20Environmental%20Data%20Chart%20-%20Reese%20Library%20-%20Augusta%20State%20University.pdf>

#### Emergency Planning

- Emergency Advice page (includes response plan template, prevention/safety

checklist, and emergency supplies checklist). Georgia Archives.

[http://www.sos.georgia.gov/archives/how\\_may\\_we\\_help\\_you/emergency\\_advice/default.htm](http://www.sos.georgia.gov/archives/how_may_we_help_you/emergency_advice/default.htm)

- Disaster Preparation and Recovery Information page (includes vital records damage assessment worksheet (Word document) and instructions (PDF). Louisiana Archives. <http://www.sos.louisiana.gov/tabid/498/Default.aspx>

## Security

- Library & Archives Patron Registration Form. Georgia Historical Society. [http://www.georgiahistory.com/files/0000/0368/Patron\\_Registration\\_Form\\_2009.pdf](http://www.georgiahistory.com/files/0000/0368/Patron_Registration_Form_2009.pdf)
- Archives and Manuscripts Research Application. Pitts Theology Library, Emory University. [http://www.pitts.emory.edu/collections/archives\\_appform.pdf](http://www.pitts.emory.edu/collections/archives_appform.pdf)
- Researcher Application and Rules and Use Policy Agreement. Richard B. Russell Library, University of Georgia Libraries. <http://www.libs.uga.edu/russell/research/application.pdf>

## Collections Care

- Care for Records page (includes a selected list of vendors for preservation supplies and services). Georgia Archives. [http://sos.georgia.gov/archives/how\\_may\\_we\\_help\\_you/care\\_for\\_records/default.htm](http://sos.georgia.gov/archives/how_may_we_help_you/care_for_records/default.htm)
- Holdings Maintenance page. National Archives. <http://www.archives.gov/preservation/holdings-maintenance/>

## Preservation Planning

- Preservation Concerns Form. Georgia Archives. <http://soga.org/resources/Documents/FF%20-%20Preservation%20-%20Georgia%20Archives.pdf>
- Condition Assessment Form. Georgia Archives. <http://soga.org/resources/Documents/FF%20-%20Accessions%20-%20Georgia%20Archives.pdf>

## Digitization

- Digital Collections page. Archives and Records Management, Georgia Tech. [http://www.library.gatech.edu/archives/digital\\_collections.html](http://www.library.gatech.edu/archives/digital_collections.html)

## Digital Documents and Electronic Records

- Digital Preservation Policy. Georgia Archives. [http://sos.ga.gov/archives/who\\_are\\_we/rims/digital\\_History/policies/policy%20-%20Digital%20Preservation%20Policy.pdf](http://sos.ga.gov/archives/who_are_we/rims/digital_History/policies/policy%20-%20Digital%20Preservation%20Policy.pdf)
- Digital Archives of Georgia. Georgia Archives. [http://sos.ga.gov/archives/who\\_are\\_we/rims/digital\\_History/default.htm](http://sos.ga.gov/archives/who_are_we/rims/digital_History/default.htm)

## Access Policy

- ALA-SAA Joint Statement on Access: Guidelines for Access to Original Research Materials. American Library Association and Society of American Archivists.

<http://www.archivists.org/statements/alasaa.asp>

- Library Access Policy. University Library, Georgia State University.  
<http://www.library.gsu.edu/about/pages.asp?ldID=68&guideID=282&ID=6009>

#### Reference Service

- Guidelines for Using the Library. Kenan Research Center, Atlanta History Center.  
<http://www.atlantahistorycenter.com/ImagesLive/Users/1/KenanMembershipGuideline.pdf>
- Rules and Regulations for the Library and Archives. Georgia Historical Society.  
[http://www.georgiahistory.com/files/0000/0026/L\\_A\\_Rules\\_full\\_page\\_layout.pdf](http://www.georgiahistory.com/files/0000/0026/L_A_Rules_full_page_layout.pdf)
- Research Services web page (includes basic search request and advanced search request forms). Georgia Historical Society.  
<http://www.georgiahistory.com/containers/11#basicsearch>
- Rules for Use of Archives and Manuscripts. Pitts Theology Library, Emory University. [http://www.pitts.emory.edu/collections/archives\\_use.cfm](http://www.pitts.emory.edu/collections/archives_use.cfm)
- Reprographic Policies and Procedures. Kenan Research Center, Atlanta History Center.  
<http://www.atlantahistorycenter.com/Images/Users/AHC/About/kenan/Policiesprelim.pdf>
- Image and Document Reproductions page (see Image Reproduction Order Form; Condition Agreement for Personal Use, and Digital Camera Policy). Georgia Historical Society. <http://www.georgiahistory.com/containers/10>
- Special Collections Reproduction Policy. Pitts Theology Library, Emory University.  
[http://www.pitts.emory.edu/collections/archives\\_reproductions.cfm](http://www.pitts.emory.edu/collections/archives_reproductions.cfm)

Note: All websites accessed July 15, 2010.

## APPENDIX 2: PROFESSIONAL ORGANIZATIONS

American Association for State and Local History (AASLH)  
1717 Church Street  
Nashville, TN 37203-2991  
615-320-3203  
615-327-9013 (fax)  
[membership@AASLH.org](mailto:membership@AASLH.org)  
[www.aaslh.org](http://www.aaslh.org)

American Association of Museums (AAM)  
1575 Eye Street, NW  
Suite 400  
Washington, DC 20005  
202-289-1818  
202-289-6578 (fax)  
[www.aam-us.org](http://www.aam-us.org)

American Institute for Conservation of Historic and Artistic Works (AIC)  
1156 15th Street NW, Ste. 320  
Washington, DC 20005  
202-452-9545  
202-452-9328 (fax)  
[info@conservation-us.org](mailto:info@conservation-us.org)  
[www.conservation-us.org](http://www.conservation-us.org)

American Library Association (ALA)  
50 East Huron  
Chicago, IL 60611  
800-545-2433  
312-440-9374 (fax)  
[ala@ala.org](mailto:ala@ala.org)  
[www.ala.org](http://www.ala.org)

ARMA International  
11880 College Blvd., Suite 450  
Overland Park, KS 66210  
913-341-3808  
800-422-2762  
913-341-3742 (fax)  
[www.arma.org](http://www.arma.org)

A not-for-profit professional association and the authority on managing records and information – paper and electronic.

Georgia Association of Museums and Galleries (GAMG)  
PO Box 2133  
Marietta, GA 30061  
GAMG Office: 770-853-7539  
[gamg@gamg.org](mailto:gamg@gamg.org)  
[www.gamg.org](http://www.gamg.org)

Georgia Library Association  
PO Box 793  
Rex, GA 30273  
678-466-4334  
<http://gla.georgialibraries.org>  
GLA News Blog:  
<http://glanews.blogspot.com/>

National Association of Government Archives and Records Administrators (NAGARA)  
90 State Street, Suite 1009  
Albany, NY 12207  
518-463-8644  
518-463-8656 (fax)  
[nagara@caphill.com](mailto:nagara@caphill.com)  
[www.nagara.org](http://www.nagara.org)

Society of American Archivists (SAA)  
17 North State Street  
Suite 1425  
Chicago, IL 60602-3315  
312-606-0722  
toll-free 866-722-7858  
312-606-0728 (fax)  
[www.archivists.org](http://www.archivists.org)

Society of Georgia Archivists (SGA)  
P.O. Box 133085  
Atlanta, Georgia 30333  
[president@soga.org](mailto:president@soga.org)  
[www.soga.org](http://www.soga.org)

Southeast Regional Conservation Association (SERCA)  
Contact the Georgia Archives ([www.sos.ga.gov/archives](http://www.sos.ga.gov/archives)) for up-to-date information.

## APPENDIX 3: SELECTED PUBLICATIONS AND WEBSITES

### Understanding and Managing Archives

Dearstyne, Bruce. Leading and Managing Archives and Records Programs. New York: Neal-Schuman Publishers, 2008.

Kurtz, Michael. Managing Archival and Manuscript Repositories (Archival Fundamentals Series II). Chicago: Society of American Archivists, 2004.

O'Toole, James M., and Richard Cox. Understanding Archives and Manuscripts (Archival Fundamentals Series II). Chicago: Society of American Archivists, 2006.

Pearce-Moses, Richard. Glossary of Archival and Records Terminology (online), at <http://www2.archivists.org/glossary>.

### Mission and Strategic Planning

Allison, Michael, and Jude Kaye. Strategic Planning for Nonprofit Organizations. Hoboken, NJ: John Wiley and Sons, 2005.

Bryson, John. Strategic Planning for Public and Nonprofit Organizations: A Guide to Strengthening and Sustaining Organizational Achievement. San Francisco, CA: Jossey-Bass, 2004.

Lyddon, Jan W. Strategic Planning in Smaller Nonprofit Organizations: A Practical Guide for the Process. Management Guide #7, Nonprofit Leadership and Administration Faculty, Western Michigan University, April 1999.

Mittenthal, Richard A. Ten Keys to Successful Strategic Planning for Nonprofit and Foundation Leaders. TCC Group Briefing Paper, 2002.

### Grant Writing

Barbato, Joseph, and Danielle Furlich. Writing for a Good Cause: The Complete Guide to Crafting Proposals and Other Persuasive Pieces for Nonprofits. New York, NY: Fireside, 2000.

Bauer, David G. The "How To" Grants Manual: Successful Grantseeking Techniques for Obtaining Public and Private Grants (Ace/Praeger Series on Higher Education). Rowman and Littlefield, Inc., 2009.

Gerding, Stephanie, and Pamela H. Mackellar. Grants for Libraries: A How-To-Do-It Manual. New York, NY: Neal-Schuman Publishers, 2006.

## **General Management**

Campbell, Katherine Noyes, and Susan J. Ellis. The (Help!) I-Don't-Have-Enough-Time Guide to Volunteer Management. Philadelphia, PA: Energize, Inc., 1995.

Fixler, Jill Friedman, and Sandie Eichberg. Boomer Volunteer Engagement: Collaborate Today, Thrive Tomorrow. Bloomington, IN: AuthorHouse, 2008.

Ruppel, Warren. Not-for-Profit Accounting Made Easy. Hoboken, NJ: John Wiley and Sons, 2007.

## **Collection Assessment/Appraisal**

Boles, Frank. Selecting and Appraising Archives and Manuscripts (Archival Fundamentals Series II). Chicago: Society of American Archivists, 2005.

Craig, Barbara. Archival Appraisal: Theory and Practice. KG Saur, 2004.

## **Archival Arrangement and Description**

Carmicheal, David W. Organizing Archival Records: A Practical Method of Arrangement and Description for Small Archives. Walnut Creek, CA: AltaMira Press, 2004.

Describing Archives: A Content Standard. Chicago: Society of American Archivists, 2004.

Dow, Elizabeth. Creating EAD-Compatible Finding Guides on Paper. Lanham, MD: Scarecrow Press, 2005.

Roe, Kathleen. Arranging and Describing Archives and Manuscripts (Archival Fundamentals Series II). Chicago: Society of American Archivists, 2005.

## **Preservation**

Council of State Archivists, Emergency Preparedness Initiative and IPER Project, at <http://www.statearchivists.org/prepare/index.htm>. Provides information on emergency response and records-related emergency training for state and local governments.

Heritage Emergency National Task Force, at <http://www.heritagepreservation.org/programs/taskfer.htm>. Offers tools and information to cultural institutions and the general public for preparing for and responding to emergencies that affect collections and family treasures.

Image Permanence Institute, at [www.imagepermanenceinstitute.org](http://www.imagepermanenceinstitute.org). A nonprofit, university-based laboratory devoted to preservation research. Provides information on



preservation of images, including environmental control and collections management.

National Film Preservation Foundation. Film Preservation Guide: The Basics for Archives, Libraries, and Museums. San Francisco: NFPF, 2004.

Pacifico, Michele F., and Thomas P. Wilsted. Archival and Special Collections Facilities: Guidelines for Archivists, Librarians, Architects, and Engineers. Chicago: Society of American Archivists, 2009.

Reilly, James M. Care and Identification of 19<sup>th</sup>-Century Photographic Prints. Rochester, NY: Eastman-Kodak Company, 1986.

Ritzenthaler, Mary Lynn, and Diane L. Vogt-O'Connor, with Helena Zinkham, Brett Carnell, and Kit A. Peterson. Photographs: Archival Care and Management. Chicago: Society of American Archivists, 2006.

Ritzenthaler, Mary Lynn. Preserving Archives and Manuscripts (2<sup>nd</sup> edition). Chicago: Society of American Archivists, 2010.

Wilhelm Imaging Research, at [www.wilhelm-research.com](http://www.wilhelm-research.com). Free download of Henry Wilhelm's The Permanence and Care of Color Photographs (1993) is available here.

Wellheiser, Johanna, and Jude Scott. An Ounce of Prevention: Integrated Disaster Planning for Archives, Libraries, and Record Centers (2<sup>nd</sup> edition). Canadian Archives Foundation and Scarecrow Press, 2002.

## **Digital Materials**

BCR's CDP Digital Imaging Best Practices Working Group. BCR's CDP Digital Imaging Best Practices, Version 2.0, at <http://www.bcr.org/dps/cdp/best/digital-imaging-bp.pdf>. June 2008.

Cornell University Library. Moving Theory into Practice: Digital Imaging Tutorial, at <http://www.library.cornell.edu/preservation/tutorial/contents.html>. 2003.

Dow, Elizabeth H. Electronic Records in the Manuscript Repository. Lanham, MD: Scarecrow Press, 2009.

Landis, William E., and Robin L. Chandler. Archives and the Digital Library. London and New York: Routledge, 2007.

## **Public Services**

Pugh, Mary Jo. Providing Reference Services for Archives and Manuscripts (Archival Fundamentals Series II). Chicago, Society of American Archivists, 2005.

## APPENDIX 4: RESOURCES FOR GRANT FUNDING

### Federal

Institute of Museum and Library Services. [www.ims.gov](http://www.ims.gov).

A grant-making federal agency that supports museums and libraries of all types. See [www.ims.gov/applicants/institution.shtm](http://www.ims.gov/applicants/institution.shtm) for a list of grant programs by institution type.

National Endowment for the Humanities Division of Preservation and Access, [www.neh.gov/whoweare/divisions/PreservationAccess/index.html](http://www.neh.gov/whoweare/divisions/PreservationAccess/index.html).

See particularly the Preservation Assistance Grants for Smaller Institutions, which fund preservation surveys, consultation on a specific preservation/conservation issue or need, purchase of storage furniture and preservation supplies, purchase of environmental monitoring equipment, and education and training.

National Historical Publications and Records Commission. [www.archives.gov/nhprc/](http://www.archives.gov/nhprc/).

See particularly the Archives-Basic Projects grants, which fund fundamental archival activities that promote the preservation and use of America's documentary heritage (includes basic processing, preservation planning, collections development, and establishing archives).

### State

Georgia Association of Museums and Galleries (GAMG) Museum Services Exchange (MUSE). [www.gamg.org](http://www.gamg.org).

A program of consulting services, where experienced museum professionals provide information and feedback to large and small museums. See the GAMG Newsletter Summer 2010 for a program summary, at [www.gamg.org/NewFiles/GAMGSummer2010.pdf](http://www.gamg.org/NewFiles/GAMGSummer2010.pdf)

Georgia Historic Preservation Division grants.

<http://gashpo.org/content/displaynavigation.asp?TopCategory=200>

Grant programs include the Georgia Heritage Grant Program, which offers matching funds on a statewide competitive basis to local governments and nonprofit organizations for the preservation of National Register-eligible properties, and Historic Preservation Fund Grants, which distribute federal funds in the form of grants to Georgia's Certified Local Governments (these are 60/40 matching grants that enable cities, towns, and rural areas to undertake projects to preserve historic properties).

Georgia Historical Records Advisory Board grant programs.

[www.sos.georgia.gov/archives/who\\_are\\_we/ghrab/grant\\_programs/default.htm](http://www.sos.georgia.gov/archives/who_are_we/ghrab/grant_programs/default.htm).

Programs include digitization services grants, circuit rider archivist program, and historical records project grants.

Georgia Historical Society Affiliate Chapter program.

[www.georgiahistory.com/containers/22](http://www.georgiahistory.com/containers/22)

A statewide network for local historical organizations. Members include historical and genealogical societies, commissions, museums, foundations, archives, preservation organizations, churches, and patriotic organizations. Membership benefits include consultations, programs and workshops, and subscriptions.

Georgia Humanities Council. <http://www.georgiahumanities.org/grantmaking/index.html>

The Georgia Humanities Council Grant Program provides financial support for cultural and humanities-based educational programs that strengthen local communities by providing opportunities for learning and discussion among all participants. Grants are awarded to such nonprofit organizations as museums, libraries, historical societies, community groups, educational institutions and government agencies.

## **Private**

The Foundation Center. <http://foundationcenter.org/>.

An online directory of private philanthropic and grant making foundations. Also provides information on proposal-writing and training.

## APPENDIX 5: RESOURCES FOR EDUCATION AND TRAINING

ARMA International. [www.arma.org/learningcenter/index.cfm](http://www.arma.org/learningcenter/index.cfm)

ARMA provides online courses, certification, and other professional development resources.

The Georgia Archives Institute. <http://www.georgiaarchivesinstitute.org/>

An educational program designed for beginning archivists, manuscript curators, and librarians, held yearly at the Georgia Archives in Morrow, GA.

LYRASIS. <http://www.lyrasis.org/Classes-and-Events.aspx>

Created in April, 2009 by the merger of PALINET and SOLINET and joined shortly thereafter by NELINET, LYRASIS is the nation's largest regional membership organization serving libraries and information professionals. The primary service area is the Mid-Atlantic, Southeastern, and New England regions.

National Archives. Modern Archives Institute.

<http://www.archives.gov/preservation/modern-archives-institute/>

A 2-week program that provides an introduction to archival principles and techniques for individuals who work with personal papers, as well as those who work with the records of public and private institutions and organizations. It is intended to help archivists acquire basic knowledge about caring for archival materials and making them available.

Society of American Archivists. Colonial Dames of America Scholarships to the Modern Archives Institute. <http://www.archivists.org/governance/handbook/section12-damescutt.asp>

Since 1974, SAA has awarded the Colonial Dames Scholarships, which enable two archivists each year to attend the Modern Archives Institute of the National Archives and Records Administration. One scholarship supports attendance at the Winter Institute, held in January/February, and the other supports attendance at the Summer Institute, held in June.

Society of American Archivists. Conference/Workshop Calendar.

<http://saa.archivists.org/Scripts/4Disapi.dll/4DCGI/events/ConferenceList.html?Action=GetEvents>

A listing of on demand web seminars and upcoming workshops and conferences on archival topics.

Society of American Archivists. Directory of Archival Education.

<http://www2.archivists.org/dae>

A listing of archival education providers throughout the country. Provides information about degrees/certificates offered, faculty, and courses offered.

Society of Georgia Archivists Scholarships. <http://soga.org/scholarships>

Scholarships to support attendance at the Georgia Archives Institute, SGA meetings and workshops, and/or the SAA annual meeting.